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State of Wisconsin
Governor Scott Walker



TO: **W-2 Agencies
Training Staff**

FROM: Janice Peters, Director
Bureau of Working Families
Division of Family and Economic Security
Department of Children and Families

BWF OPERATIONS MEMO

No: BWF 14-20

DATE: 10/30/2014

W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>	RAP	<input type="checkbox"/>	Other EP	<input type="checkbox"/> *

SUBJECT: **Update to Wisconsin Works Formal Assessment Policy**

CROSS REFERENCE: [W-2 Manual 5.5.3, Necessary Elements](#)
[W-2 Manual 5.5.5, Inadequate or Conflicting Formal Assessment Information](#)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to communicate a policy change when the Financial and Employment Planner (FEP) has inadequate or conflicting formal assessment information with which to make service and placement decisions for a participant.

BACKGROUND

W-2 Manual, Section 5.5.3, defines the "necessary elements" of a formal assessment and requires that a qualified assessing agency provide an individualized written assessment that allows the FEP to adapt Wisconsin Works (W-2) activities to accommodate the needs of the participant.

W-2 agencies have recently shared concerns about the quality of formal assessments completed by some medical providers. When completing the [Medical Examination & Capacity form \(DCF-F-DWSP2012\)](#), providers will often recommend that the participant engage in few or no hours of W-2 activities, but provide no medical information to support the recommendation, or the provider will fail to complete the section of the form addressing accommodations in work activities, making it difficult for the FEP to determine how best to adapt W-2 activities to meet the needs of the participant.

POLICY CHANGE

The following policy change to W-2 Manual, Section 5.5.5, will give W-2 agencies the ability to get assessment information through an independent assessment when there is inadequate or conflicting formal assessment information for a participant.

➤ **Note:** The policy changes are underlined below.

5.5.5 INADEQUATE OR CONFLICTING FORMAL ASSESSMENT INFORMATION

When obtaining formal assessment information for a participant with a medical or mental health condition, the W-2 agency should consult initially with the provider who is treating the participant for the condition. If the documentation provided does not contain information needed to determine an appropriate placement or necessary accommodations for the participant, the W-2 agency may refer the participant to another service provider for an independent assessment. (See W-2 Manual, 5.5.3)

If assessment information is gathered from multiple sources, and there is conflicting information about the medical condition or what services or accommodations are needed to address the condition, the agency should use the information from the provider who has provided an independent assessment.

If multiple service providers are each treating the participant for different medical conditions, e.g., one is treating for a back problem and the other is treating for a mental health condition, and they provide different opinions about the accommodations that are needed, the FEP must assign activities and provide needed accommodations based on both assessments.

ACTION REQUIRED

W-2 agencies must discuss the formal assessment policy change with staff and update any relevant local agency procedures.

CONTACTS

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For W-2 CARES Processing Questions: W-2 Help Desk

DCF/DFES/BWF/HH